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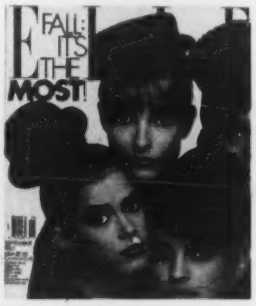
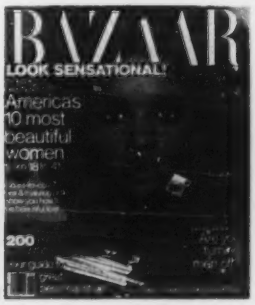
Folio:

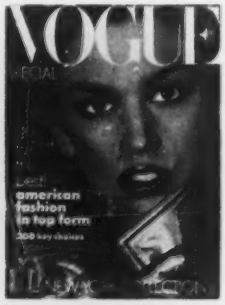
A Publication of The Hanson Publishing Group, Inc.

NOVEMBER 1989 THE MAGAZINE FOR MAGAZINE MANAGEMENT $6.50

Analyzing covers that sell







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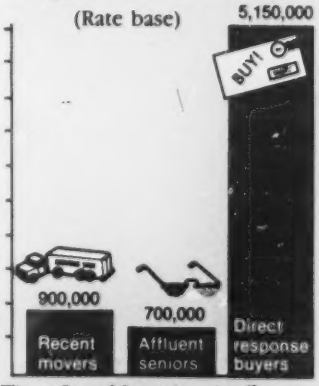

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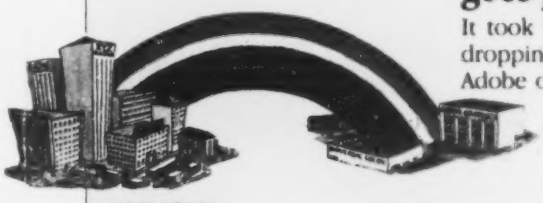

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Dynamic Young Women— Eager Participants In Today's Lively Health & Beauty Conscious Lifestyle!

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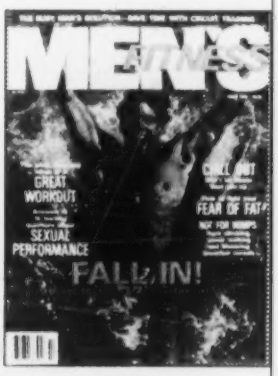

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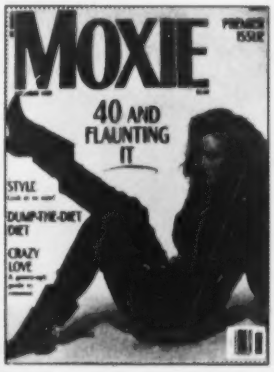

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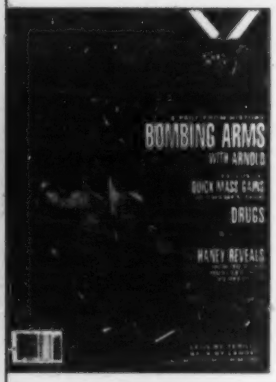

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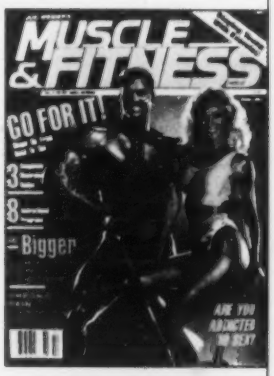

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UPDATE

Time targets new ad dollars

Groundbreaking TargetSelect program enables Time to pursue new ad categories and co-op dollars

by Barbara Love

NEW YORK CITY—Innovative binding technology is finally getting big-scale recognition and use. In January, Time Inc. Magazines will begin using selective binding in a new ad program designed to entice advertisers from direct mail, promotions and newspapers.

For years now, the technology has been available, but only a few publishers—*Farm Journal* and *American Baby*—have taken advantage of it. Time will become the first large-scale publisher to offer targeted audiences, initially through *People, Sports Illustrated* and *Time*. *Money* and *Entertainment Weekly* will eventually follow.

TargetSelect, hailed as a major event in magazine marketing, enables Time to create personalized magazines according to subscriber interests, demographics or purchasing patterns. Advertisers can also communicate individually with each subscriber by name and include other targeted selling information via ink-jet technology.

Time expects the new plan to attract advertising from new ad categories, other media (direct mail and newspapers), promotion dollars, and, of course, other magazines. In particular, the technology allows Time "to aggressively pursue co-op advertising that's more typically in local newspapers today," says Bruce Judson, director of marketing.

The program, created by vice president-marketing Donald Elliman, is expected to bring in a "significant" increase in advertising income. And, even though Time is reportedly sharing the costs of its printers' expensive selective bindery systems, TargetSelect will be profitable within a year, asserts president Reginald Brack Jr.

TargetSelect has three offerings:

• Specially tailored, monthly advertising editions targeted to recent movers, high income seniors and proven direct response buyers. "We've isolated groups where there really isn't a vehicle for advertisers today," says Judson. Advertising to recent movers and seniors is limited to eight pages—two spreads and four single pages.

• Personalized messages, which enable advertisers to insert the name of the reader or nearby dealer in the ad. (Initially, the ink-jet message is only available horizontally, perpendicular to the foot of the magazine.) Also possible are personalized response cards and variable coupon offers.

• Custom-crafted targeting, availa-

(CONTINUED ON PAGE 48)

***Tailored monthly advertising sections** in three markets will be offered initially to advertisers in* People, Sports Illustrated *and* Time.

More publishers switch to freesheet

Overall paper demand expected to pick up by 7.6% in 1990, MPA survey reports

by Diane Cyr

NEW YORK CITY—More publishers are continuing to upgrade their magazines with coated freesheet, according to this year's paper use survey conducted by the Magazine Publishers of America (MPA). Last year, coated freesheet comprised just 11.6 percent of publishers' paper tonnage; that will increase to 14 percent this year.

But economy is still a concern for many other publishers who are continuing to use lighter weight papers and narrower paper rolls. Coated groundwood, which makes up 66 percent of the tonnage used, is still by far the paper of choice among the 61 publishers surveyed.

"People are shopping for value," says Richard Brown, vice president, publication paper sales, Alling & Cory, "but if you're talking about choosing among price, quality and service, quality has been most important. Publishers in general are committed to presenting a higher quality product, giving advertisers more bang for the buck."

This year's shift to freesheet is also shown through publishers' choice of basis weights: Use of 40 lb. paper is expected to drop slightly, while use of 45 lb. paper—the minimum weight for

Coated freesheet is fastest-growing paper stock

	Tonnage (1989 est.)	% of total tonnage	% change from 1988	Tonnage (1990 est.)	% change from 1989
Coated groundwood	1,088,202	66.0%	0%	1,176,748	+8.1
Coated freesheet	228,072	14.0%	+25.3	235,944	+3.4
Uncoated groundwood	242,019	14.8%	+8.5	254,770	+5.3
Uncoated freesheet	11,453	0.7%	+13.1	12,038	+5.1
Overseas coated groundwood	51,374	3.2%	+8.0	57,413	+11.8
Overseas uncoated groundwood	6,190	0.4%	−15.7	14,070	+127.3
Total groundwood	1,387,785	85.0%	+1.6	1,503,001	+8.3
Total freesheet	239,525	14.7%	+24.7	239,525	+3.5
TOTAL TONNAGE	1,627,310		+4.4	1,750,983	+7.6

Source: MPA

Upgrading under way: *Last year coated freesheet comprised just 11.6 percent of publishers' page tonnage; that will increase to 14 percent this year. But coated groundwood is still by far publishers' paper of choice.*

freesheet—has increased from 3.6 percent of tonnage in 1988 to 6.3 percent this year. Meanwhile, other basis weights are holding steady, although 34 lb. paper, the most heavily used stock, is expected to increase slightly in tonnage, while use of higher grade weights is expected to drop slightly.

Demand expected to rise

Meanwhile, overall paper demand is expected to perk up. Although demand climbed just 4.4 percent this year, usage is expected to increase by 7.6 percent for 1990. More publishers will also be using imported papers: Tonnage is also expected to increase from 3.5 percent this year to 4.1 percent next.

A continuing trend to narrower trim sizes has also led 16.4 percent of publishers to switch to narrower roll sizes. No publishers indicated they would switch to wider rolls.

Inventory figures are nearly identical to last year. Nearly three-quarters of publishers are keeping less than two months' supply on hand, with that figure nearly evenly divided between those stocking a one to 30 day supply and those working from a supply of 31 to 60 days.

Publishers are also continuing a switch away from gravure. About 73 percent of publishers used offset printing last year; that will increase to 74 percent this year and next.□

Mailers test delivery time with USPS

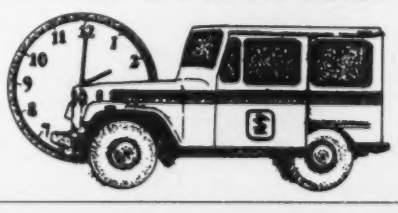
WASHINGTON, D.C.—For the first time, five mailers and the United States Postal Service (USPS) will work together to measure the delivery time of third class bulk business mail. The test, slated for March 1990, will measure delivery time to 25 major cities that receive roughly 40 percent of bulk mail. If successful, the test could result in an ongoing subscription service to mailers.

The new test follows another recent mailer-Postal Service collaboration, which measured third class nondelivery.

The Third Class Mail Analysis System (TCMAS) test is currently waiting to hire a contractor, who must be able to mail to a panel of 6,000 reporters. Reporters will telephone delivery information to the vendor as they receive mail, says David Beckerman, vice president, marketing services for Radio Shack and chairman of the TCMAS committee.

Radio Shack, one of the participating mailers, plans to merge its 6,000 seed mailings into the eight million pieces sent out to target cities, says Beckerman. "We don't want it to look like test mail," says Ann Robinson, USPS consumer advocate. "We want it to look like something sent in a normal mailing process."

The test will allow mailers to retrieve their own mailing data from the vendor as it becomes available.



The USPS will have access to all mailings during the test and can use the data to see if mail is being delivered according to its own performance standards. Mailers will be able to use the system to point out lapses in delivery time, but, at this time, are not able to make recommendations to the Postal Service.

"We don't intend it to be a hammer over the Postal Service's head," says Chuck Albright, vice president distribution services at R.R. Donnelley and a member of the TCMAS committee. "We intend it to be a management service tool."

In addition to Radio Shack, the five participating mailers include R.R. Donnelley, Foster & Gallagher, Alden Press and Harte-Hanks.

If the program becomes available to all third class mailers, a single year subscription, which would allow two test mailings per month, would cost $20,000 to $30,000.□

More titles offer ad exclusivity

The move goes beyond special issues and sections

by Rachel Kaplan

NEW YORK CITY—Long the province of network television, category exclusivity in print is expanding beyond single-sponsor issues and special advertising sections, and is being used as a lure for advertisers looking to stand apart from the madding crowd.

For the first time ever, *People* offered category exclusivity in a special October issue, *People Extra: The '80s*. The issue, which was sent to subscribers and sold on newsstands, featured advertising sold at the regular rate base of three million.

Category exclusivity was offered to differentiate the special issue from the normal weekly, and to offer "an unusual showcase for products," according to Howard Kuntz, *People*'s sales development director.

Category exclusivity is being increasingly used as a lure to hook advertisers who want to stand apart from the crowd

The issue contained 62 pages of advertising from such categories as health and beauty aids, cosmetics, electronics, automotive and tobacco. Most advertisers had a minimum commitment of two to four pages; but in some categories, such as automotive, the page commitment was higher.

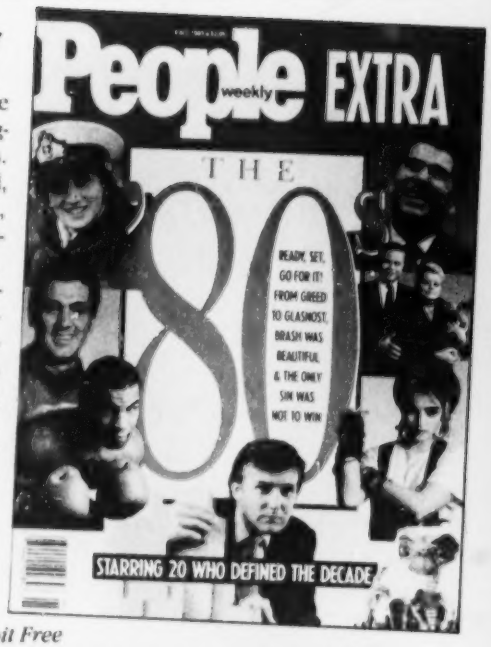
Meanwhile, other major publishers are launching single-sponsor issues to showcase advertisers. As *Time* publishes its first single-sponsor issue with Kodak (see Briefings, this issue), Meredith Corp. is resurrecting *Apartment Life*, the original name of its *Metropolitan Home*, to go on newsstands October 31 in the top 25 metropolitan markets. Chevrolet has signed on as the sole sponsor of the 132-page magazine, which will carry 20 ad pages. According to publisher Jerry Ward, the next issue will appear May 31, 1990, and *Apartment Life* eventually will be published quarterly.

Locally edited Sunday magazines, too, are easing into offering category exclusivity. Metropolitan Sunday Newspapers (MSN), for the first time this year, offered category exclusivity in 26 independent Sunday newspaper supplements devoted to health and fitness.

Among the newspapers participating in the Good Health Sunday program are *The Boston Herald*, the *Buffalo News*, *The Dallas Morning News*, the *Detroit Free Press*, the *San Francisco Examiner* and the New York *Daily News*. To coordinate the nationwide effort, MSN got all the participants to schedule health and fitness editorial in their Sunday supplements for October 8. The price of a four-color page in the program was $115,000.

Because the program got off to a late start, only three advertisers signed up for the program, one of which was *Weight Watchers*, according to Phyllis Cavaliere, Eastern manager at MSN. Others were Sears and Diversified Products, an athletic equipment manufacturer.

"Other advertisers were interested in the program, including analgesic marketers like Bristol-Myers, and juice people, like Minute Maid and Tropicana," says Cavaliere. "But because their budgets were already set, they couldn't participate." The advertisers, she adds, were attracted by the opportunity to run in a mass medium with a specific editorial focus. "There are a lot of vertical books out there, but we're offering a circulation of about 20 million."


People weekly EXTRA
THE
80
READY, SET, GO FOR IT! FROM GREED TO GLASNOST, BRASH WAS BEAUTIFUL & THE ONLY SIN WAS NOT TO WIN
STARRING 20 WHO DEFINED THE DECADE

Minimum commitment: *Most advertisers in* People Extra: The '80s *had a two- to four-page advertising commitment, although in some categories it was higher.*

Joining forces

Another Good Health program is slated for April, and MSN is organizing the newspapers to join forces in a major back-to-school Sunday magazine supplement to run at the end of August 1990. "We probably will have category exclusivity in that program as well," Cavaliere says.□

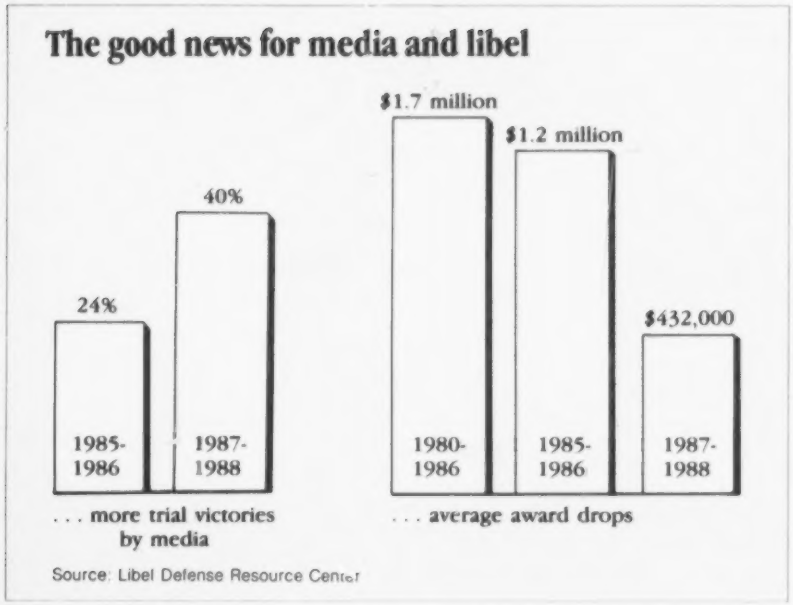
Media more successful in libel cases

More trials are won by media, while average award drops greatly

by Michael Garry

NEW YORK CITY—The media's record in libel cases took a turn for the better during 1987 and 1988, according to a study conducted by the Libel Defense Resource Center (LDRC), a libel research organization supported by media groups.

The study found that media defendants—including broadcast and print media—won 40 percent of the 47 libel case trials by jury during the two-year period. (Three of those trials involved magazines, only one of which prevailed, and 29 concerned newspapers.) That represents a marked improvement over the prior two-year period, when media companies won only 24 percent of libel cases. It also



***Media defendents won** 40 percent of the 47 libel case trials by jury tracked during the two-year period by the Libel Defense Resource Center.*

marks the highest winning percentage since the LDRC began compiling libel case data in 1980.

The study noted other positive developments: No awards in excess of $10 million were granted during the period, and the number of $1 million awards declined by about half compared to the prior two years.

In addition, the average award granted at the trial level declined, from $1,167,189 to $431,730, during the prior two-year period. In the six years prior to 1987, the average award was $1,730,677. On the other hand, the incidence of awards between $500,000 and $1 million was greater than ever before in the 1980s.

Relatively favorable results

"After years of reporting gloomy trends in the media libel field—particularly in the early part of the decade—it is certainly a pleasure to be able to announce the relatively favorable results of LDRC's latest two-year statistical compilations," says LDRC general counsel Henry R. Kaufman. Kaufman especially welcomes the absence of "outrageously inflated" eight-figure awards. "The largest single award during the recent period," he notes, "was lower than the average award imposed in media libel cases over the prior six years."

Why are the jury awards lower? It could be, says Kaufman, that judges and lawyers have become more realistic in their directions to juries. He also speculates that plaintiff's lawyers, realizing that mega-awards are frequently overturned, are not aiming as high; in a separate survey, however, those attorneys deny that they are toning down their monetary requests. In any event, the trend toward smaller jury awards is happening throughout the legal system, notes Kaufman.

On the other hand, says Kaufman, the average damage award, though lower than recent years, still constitutes "an unacceptably high tariff on free expression." And the media's overall winning percentage in libel trials since 1980, he points out, remains at only 28 percent—"still an unacceptably poor showing."

Kaufman would not speculate on why the past few years showed a better record for libel trial victories. The reasons tend to vary from case to case, he says, and can include better preparation by media attorneys, more sympathetic juries, or simply, more defensible cases.

But media lawyers may be taking libel trials more seriously because the number of cases reversed on appeal is dropping, speculates David A. Anderson, professor of law at the University of Texas. Studies done at Stanford University in the 1970s, he notes, indicated that from 75 percent to 80 percent of unfavorable libel rulings were reversed, while 62 percent were reversed in the recent study.

Last June, the U.S. Supreme Court let stand a $200,000 judgment against Harte-Hanks Communications, Inc.—the first time since the late 1960s that the Court upheld a plaintiff in a case involving "actual malice," says Anderson. This is a warning, he adds, that "you can't count on the Supreme Court to bail you out anymore."□

TV-print synergy unveiled in *Episodes*

ABC hopes to lure print advertisers to TV, and TV fans to print

by Kevin Sgbia

***What started as a promotional** tool for daytime soaps has turned into an advertising vehicle.*

NEW YORK CITY—Now that it's rolling out its first magazine, ABC Television, producer of such hit daytime soap opera dramas as "All My Children" and "General Hospital," hopes to create lucrative combination print and televi-

Demographic trends: Advertisers question value

NEW YORK CITY—Unless they're circling Neptune on Voyager II, just about everyone knows that the biggest market surge to come will be that of the aging baby boomers. But while advertisers agree that tracking is important, they are divided about the trends' near-term relevance, according to a recent Vitt Media Monitor survey.

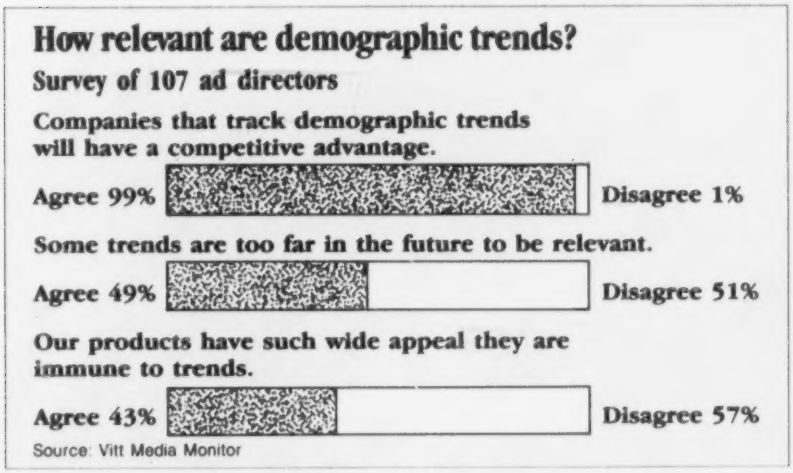
Vitt Media, a media buying and planning firm, based its findings on a telephone survey of 107 advertisers with annual ad budgets of $5 million or more. Ad directors, Vitt states, agree that the two most important future trends will be an increase in the number of working women, and an aging population. Moreover, 99 percent agree that companies planning for those demographic changes will have a competitive advantage in the future.

But at the same time, half the ad directors believe that demographic trends are too far off into the future to be relevant to their current ad strategies. And 43 percent say their products will be able to weather the trends unchanged.

"To assume that products can be marketed without concern for demographic changes," states the survey, "leaves the door wide open for more aggressive and savvy marketers."

To date, about half of those advertisers who market services have either extended or modified their existing service lines to seniors, or have introduced new services for them. Only about one-quarter of product advertisers, on the other hand, have changed their goods to meet seniors' needs. According to the survey, most product introductions have been directed at teens, "while seniors, with a much higher rate of disposable income and more leisure time than young people, are seen as the best prospect for new services."

Half the advertisers also believe media will be affected by demographic trends—but that most changes will be in broadcast and cable. As for print, the ad directors expect changes in editorial content, rather than an increase in the number of new titles aimed at seniors. □


How relevant are demographic trends?
Survey of 107 ad directors
Companies that track demographic trends will have a competitive advantage.
Agree 99%
Disagree 1%
Some trends are too far in the future to be relevant.
Agree 49%
Disagree 51%
Our products have such wide appeal they are immune to trends.
Agree 43%
Disagree 57%
Source: Vitt Media Monitor

***In the future,** an aging population and increase of women in the workforce will be the most important demographic trends, ad directors agree.*

Personalized cartoons get mixed results

LOS ANGELES—Are personalized cartoons in direct mail packages worth the expense? The answer, according to magazines that have tested them, depends largely on the market.

By featuring a personalized, *New Yorker*-style cartoon on its mail pieces, *Restaurant & Hotel Design*, for example, got a 17 percent response to a subscription mailing to 40,000 members of the American Institute of Architects.

The controlled-circulation magazine discovered that more architects than it had previously thought were practicing hospitality design. About 280 architects, moreover, paid $24.95 for a 8" x 10" frameable print of the personalized cartoon. The profits were split by *Restaurant and Hotel Design* and the cartoon's creator, Stu Heinecke + Partners, Beverly Hills, whose creative costs were $15,000.

Two years ago, *Outdoor Life* launched two successful campaigns using cartoons. The magazine mailed four million postcards displaying a personalized fishing cartoon.

Subscribers were also offered frameable 8" x 11" lithographs of the cartoon, which cost *Outdoor Life* $1 each—50 cents more than four wildlife prints that had been used as a premium. The campaign produced a 65 percent lift in response and 78 percent increase in pay-up, becoming the new control.

> "In this business, you have to constantly test new items or your response rates will drop."

"It was one of our most successful premiums," says Jose Perez, circulation director, Times-Mirror magazines. "But since then, other premiums have beaten it. A hunting knife replaced the cartoon by a slim margin, and now we're using a flashlight.

"In this business," he adds, "you have to constantly test new items or your response rates will drop. People suffer premium fatigue."

Perez also tested a personalized cartoon on a postcard for *Golf Magazine*, but found it didn't beat the control. "I guess golfers don't find jokes about their game very funny," Perez says.

Golf Digest discovered the same thing three years ago when it tested a personalized golf cartoon by Heinecke + Partners. People who bought magazine gift subscriptions were offered a personalized lithograph of a golfing cartoon, but the cartoon wasn't displayed on the mail piece. "We thought it would be perfect for us, but it just didn't work in the test," says Diana O'Donnell, circulation director, *Golf Digest/Tennis*.

Money and *People* magazines also recently tested cartoons that were displayed on the outer envelopes. The test

Analyzing covers that sell

If you are looking only at gross volume numbers, you may be missing the boat

BY RON SCOTT

How do you know if your magazine has been a winner on the newsstand during any given month? You probably look at the hard sales numbers and say, "We're up 20,000 copies over the last issue, we did well." Or, "We were down 5,000 compared to a year ago."

But is that enough analysis? Is it enough to know what was best and or worst about the competition? Did you make your magazine the best that month or did your competitors make you the best through abdication of the marketplace? Or did you miss the market and let your competitors dominate?

I did a market analysis of four magazine groups: women's service, newsweeklies, women's fashion and computing. Although a single issue of any one of the titles within each market may have met its goals, far too often that title's market share was eroded by the strength of its competitors. For example, during the week of October 20, 1987, both *Time* and *Newsweek* met their single-copy goals—however, *U.S. News & World Report* doubled its single-copy unit sale and increased its market share by 7.8 percent.

But why should we use single-copy sales as the benchmark for success? Why not total circulation, or advertising page totals? Because total circulation and ad page numbers give you the overall response to your magazine. They do not give you an individual, issue-by-issue response. When we analyze single-copy circulation, however, we learn, in the only way possible, about direct reader response to specific issues of our magazine.

And the newsstand is the only place where we compete directly with our competitors. In almost all the cases presented here, all the competitors are available to the reader on the same display fixture at the same time.

The single-copy market is an impulse market. It takes the average consumer five seconds to decide whether or not to buy your magazine, according to a study by The New York Times Magazine Group. That is the amount of time a reader takes to size up a total editorial package. Most, if not all, of that time is devoted to the cover subject and the cover lines. Some 60 percent of the readers who buy magazines on the newsstands have no plans to purchase a magazine when they enter a store, according to another study done by *Redbook*.

A cover, then, has to work hard and fast to capture the attention and dollars of the potential reader.

Adolph Auerbacher, senior vice president and publishing director, Meredith Corp., has an informal test for cover design. He calls it the foot test. He drops the cover on the floor at his feet. Are the cover lines legible? Is the graphic easy to understand? If the answer to these two questions is "yes," then the issue has a chance on the newsstand. He also stresses that the

***Covers must work hard and fast** to make the sale, because magazines are usually an impulse buy. These covers did the job. What made them work so well?*

Ron Scott is a single-copy circulation consultant, writer and speechmaker. He operates an independent consulting firm in Derby, Connecticut, for publishers concerned with improving their single-copy circulation.

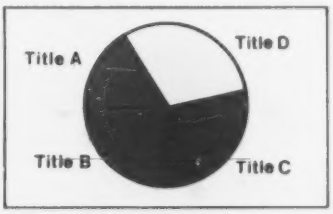
cover has to keep on selling after a person has taken the magazine home. We want the buyer to keep picking the magazine up, not just leave it sitting on the coffee table. Otherwise that reader may not be interested in buying again.

John Mack Carter, editor in chief at *Good Housekeeping*, says it this way: "One of the reasons why we are on the newsstands is to make our audience younger. It brings young people to the marketplace. It introduces our magazine to people who don't know about it through subscriptions." Surveys indicate that single-copy buyers are 10 years younger than subscribers.

Competition is both a stimulus and a frustration. None of the fashion magazines were delighted when *Elle* entered the American market. Yet all magazines in the category became sharper because of the new challenge. Consequently, the field started attracting more single-copy buyers. In 1985, the year before *Elle* became a force in the fashion field, the total single-copy circulation market for *Vogue*, *Glamour* and *Harper's Bazaar* was 2.456 million, according to the Audit Bureau of Circulations (ABC). *Elle* has an average newsstand circulation of 503,000 copies, yet the total market addressed in this article for the four titles has swelled to 3.226 million. The field has benefited, no doubt.

But before we launch into this analysis, let's look at how typical consumer products companies track their performance as compared to their competitors.

Normally we think of market share as the overall pie sliced according to component products. The pie is split up depending on which title is leading in ad pages, or circulation totals, etc.



This traditional pie graphic, which many consumer groups use to illustrate market share, is adequate for consumer products that remain essentially unchanged for long periods of time, but not for magazines. The packaging and contents of Campbell's Tomato Soup or Wonder Bread will stay the same for several years, which is why the pie is an adequate measurement for the consumer goods market.

Magazine publishers have a more challenging task. We change the packaging and the contents with every issue. We must signal the reader that we are the same, but different with every issue. This makes magazines more dynamic than any other consumer product. We know from single-copy research by various publishers that our target reader does not buy every issue we create. A composite of that research indicates that our reader buys some four issues of every 12 we publish.

Let's take another look at these readers with the help of the diagrams on this page.

At the heart of the circle are the readers who are true believers. For every single issue of a certain magazine, there is a group of people who will buy the magazine no matter what is on the cover. They're interested in the subject and loyal to the title—the true believers.

The next group is made up of the high intensity buyers who will not purchase only if the magazine fails to include something of interest for them on the cover. You have to drive them away from the market; they are not going to walk away. The next group is made up of high interest readers who buy your magazine about half the time.

But having the support of these readers is not enough to make a magazine profitable.

The profits come when you have those people who hold a moderate interest in the field, who are interested in a magazine at certain times of the year, or when their interest peaks.

Add to these groups the marginal readers who buy one or two issues a year, and you've got the full market. In fact, it is the moderate and marginally interested readers who are the key to success in this area of magazine publishing, and it's the ability to attract those readers in a challenging, competitive environment like the newsstand that makes the difference in market share.

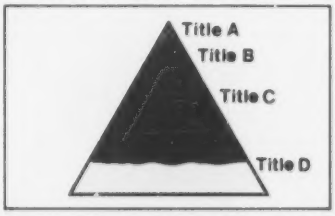
If we are competing with other magazines of similar subject matter for the same reader, and if this reader has other interests outside of this area, then we are locked into this competition every time we publish.

It follows that there are three reasons why our sales will decrease with any given issue: 1) Our potential reader is more interested in skiing or some other hobby that month. 2) Our competitor has lured the reader away with a more interesting cover. 3) We have failed to communicate that which is so fascinating about our own issue.

Through this analysis we can see that the total market can both increase or decrease at any given time, and this can be effected by the way we communicate on our cover and by the way our competitors design their covers.

The pyramid graphic gives yet another look at the magazine newsstand market. In this scenario market share is a three dimensional matrix.

Let's say title A has the most focused editorial, while titles B through D become respectively more broad in their appeal. Magazines in a market, however, don't remain in these fixed spots. Different titles may routinely "invade" the territory of the others, either strategically, or through good fortune. When this invading takes place, it affects the newsstand sale of the magazines in that market.



In this example, title B is invading two fields. It's going after readers of a magazine that may be doing a better job editorially, and one doing a poorer job; or one that may be serving readers in a different way.

Title B runs the risk of being caught in the middle, being not quite sure where it belongs in the marketplace and, consequently, struggling at both ends. A better way to grab a larger market share is to be better focused, to come up with the more intense issues that compel specific groups of readers to pick up the magazine.

How does a magazine attract buyers? With cover lines

that are well written and well displayed. Look at your own cover lines. How many different market segments are you appealing to with cover lines? Are you including enough to capture buyers who might be tempted to pick up another magazine? Are you making the cover appeal too broad, thus losing those who are interested only in specific areas?

It is also possible that the market could experience a complete breakthrough: a new computer entry; a dramatic change in fashion; or a fast breaking news story; and this may mean increased sales for all titles in the market.

How then do we test market share?

In the specific cover analysis that follows, we've constructed an arbitrary market of two, three or four titles. The first group consists of *Woman's Day* and *Family Circle*; the second, *Time, Newsweek* and *U.S. News & World Report*; the third, *Vogue, Glamour, Harper's Bazaar* and *Elle*; the fourth, *Byte, Home Computing, Compute!* and *Personal Computing*.

Each group illustrates a particular lesson in using the market share approach to analyze a cover's appeal.

In the following analysis, we have taken the four groups of titles, and with the help of the ABC Pink Sheets from 1987 and the first half of 1988, compiled an 18-month market for each of the groups. We added the single-copy sale total by issue for each of the titles and added together all the single-copy sales of the titles. We then divided by the number of issues in the 18 months to get a number that we call the "average market." We then divided each title's total single-copy sales for the 18 months by the number of issues published to get an average sale for each title. We then divided each title's average single-copy sale by the average market to express that title's percentage of the market.

With these market share databases we now have the statistical foundation needed to compare our magazine, issue by issue, with our competitors. By expressing market share in percentages rather than units, we can measure how well we do in both rising and falling markets. For example, in the analysis that follows we will see that the total market for the newsweeklies fell by 19,390 copies during the week of April 27, 1987, while *Time* increased both its unit sale and its market share during that week.

Analyzing cover design based on single-copy circulation is not a science—it is an art. Different people see different elements as most important to the relative success of a specific issue. Editors, designers and circulators all make significant contributions in such an analysis. It is important to note that the comments that follow are addressing the combined efforts of editors, designers and circulators. So let us begin.

How to use the charts that follow

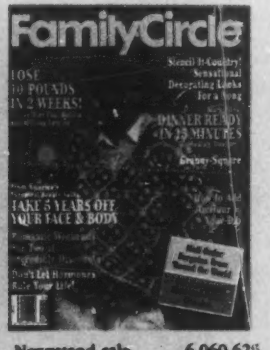
The "average market" figure is the average number of copies sold by all the magazines in a market group for each on-sale period between January 1987 and June 1988. The "total market" number is the sum of copies of all magazines sold during the actual on-sale period being analyzed. The "change" figure indicates whether the market was up or down in comparison to the "average market" figure.

1. Women's service

Woman's Day and *Family Circle* always sit next to each other on check-out fixtures in the supermarkets. These two titles have no appreciable problems either with the number of retailers they need or the display positions they occupy. Yet, we will see market fluctuations between the two titles that exceed one million copies per issue.

February 10, 1987
Total market: 10,999,825 **Change: +954,357**

Newsstand sale	4,939,200
Below avg. sale	-416,275
Market share	44.9%
Below avg. market share	-8.5%



Newsstand sale	6,060,625
Plus avg. sale	+1,370,632
Market share	55.1%
Plus avg. market share	+8.5%

Woman's Day and *Family Circle*

22 issues analyzed; covers dated from January 1987 to June 1988
Average market: 10,045,468

	Avg. mkt. share	Avg. nwsstnd. circ.	Avg. Sub. circ.
Woman's Day	53.4%	5,355,475	123,000
Family Circle	46.6%	4,689,993	1,500,000

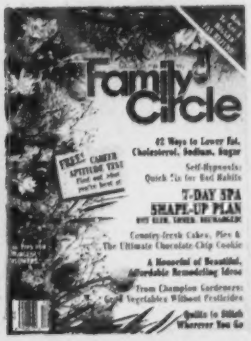
This week the market was up by almost one million copies and *Family Circle* is the big winner. The title increased its market share by 8.5 percent with this cover, bringing market share for this issue up to 55.1 percent. The successful ingredient was the positive cover lines. "Lose 10 pounds in two weeks," "Dinner ready in 15 minutes," "Take five years off your face and body." By contrast, the top cover line for *Woman's Day*—"Which lite foods help you stay healthy?" takes too long to get the message across. "Is your kid on drugs?" is certainly not a positive. Unfortunately, the rest of the cover lines are hard to read because of color choice. *Woman's Day* lost a proportional 8.5 percent share of market with this issue.

(CONTINUED)

March 24, 1987
Total market: 11,214,564 **Change: +1,169,096**

Woman's Day
15-MINUTE TEX-MEX MAIN DISHES
2 WEEKS to Shape Up YOUR THIGHS
HOW TO GET A FREE! GREAT MAKEOVER
12 WAYS TO DOUBLE YOUR MONEY
LEARN TO PUT YOUR WORRIES TO WORK

Newsstand sale	5,130,600
Below avg. sale	-224,875
Market share	45.7%
Below avg. market share	-7.7%



Newsstand sale	6,083,964
Plus avg. sale	+1,393,971
Market share	54.3%
Plus avg. market share	+7.7%

The market surges again by 1.1 million copies, and the entire increase once again goes to *Family Circle*. Where did *Woman's Day* go wrong? The cover lines stand out more than *Family Circle*, but they are carrying the wrong message. For starters, Tex-Mex has regional appeal, limiting the potential audience. The cover lines on worries and beauty make-over are negatives. *Family Circle*'s "7-Day spa shape-up plan" had a more positive message. The cover graphic for the issue is also a bit unusual for this market.

December 22, 1987
Total market: 11,482,808 **Change: +1,437,340**

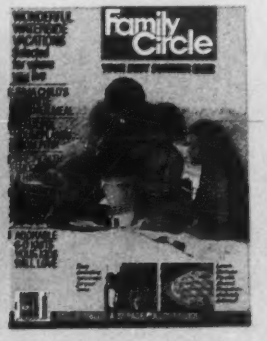
Newsstand sale	6,434,100
Plus avg. sale	+1,078,625
Market share	56.0%
Plus avg. market share	+2.6%

Newsstand sale	5,048,708
Plus avg. sale	+358,715
Market share	44%
Below avg. market share	-2.6%

The market is up by almost 1.5 million copies, so why did *Family Circle* miss the mark? The reader's eye has to wander all over this cover. It is hard to focus. Nothing stops the reader. The eye moves around like a ball in a pinball machine. The consumer says, "Editor, it is not enough to list everything that is there, you have to value it for me." Give the reader a judgment, otherwise you might as well print the contents page on the cover. *Woman's Day* captures 56 percent of the market, and increases market share by 2.6 percent.

July 7, 1987
Total market: 9,209,349 **Change: -836,119**

Newsstand sale	5,431,720
Plus avg. sale	+76,245
Market share	59.0%
Plus avg. market share	5.6%



Newsstand sale	3,777,629
Below avg. sale	-912,364
Market share	41.0%
Below avg. market share	-5.6%

Now the market is down. There are only 9.2 million copies sold this time around. *Family Circle* loses here because the cover lines are unreadable. A barbecue banner wins big for *Woman's Day*. Why doesn't *Family Circle* copy the strategy?

June 28, 1988
Total market 8,377,700 **Change: -1,667,768**

Newsstand sale	4,883,700
Below avg. sale	-471,775
Market share	58.3%
Plus avg. market share	+4.9%

Newsstand sale	3,494,000
Below avg. sale	-1,195,993
Market share	41.7%
Below avg. market share	-4.9%

Family Circle lost by going red, white and blue. People already know how to wave the flag, they need information. Meanwhile, *Woman's Day* scores big again with "barbecue." Here, *Family Circle* lost even its high interest people.

2. Newsweeklies

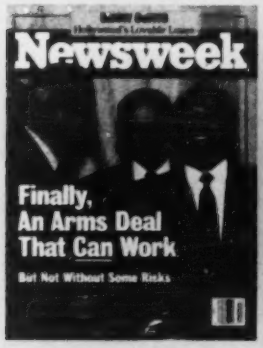
With *Time*, *Newsweek* and *U.S. News*, we have three titles that are usually sold by the same retailers, and which usually sit in the same section of the fixture. This position is usually on the main line fixture; unit sales volume usually dictates the position within the fixture. They are, then, in direct competition with each other every week.

Newsweek, Time* and *U.S. News

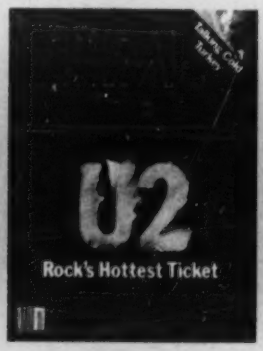
78 issues analyzed; covers dated from January 1987 to June 1988
Average market: **469,107**

	Avg. mkt. share	Avg. nwsstnd. circ.	Avg. sub. circ.
Newsweek	38.5	180,643	3 mill.
Time	49.4	231,768	4.4 mill.
U.S. News	12.9	56,694	2.2 mill.

April 27, 1987
Total market: 449,717 **Change: -19,390**



Newsstand sale	120,800
Below avg. sale	-59,843
Market share	26.9%
Below avg. market share	-11.6%

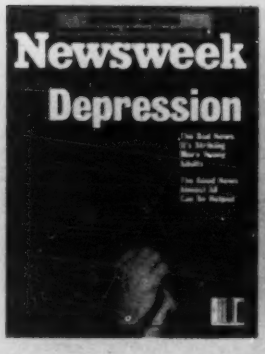


Newsstand sale	286,749
Plus avg. sale	+54,981
Market share	63.8%
Plus avg. market share	+14.4%

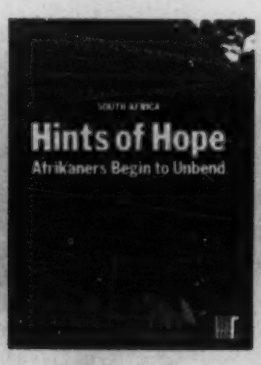
Newsstand sale	42,168
Below avg. sale	-14,526
Market share	9.4%
Below avg. market share	-3.5%

Even though the market is down by almost 20,000, *Time*'s 14.4 percent gain of market proves that pop has more appeal than U.S.-Soviet relations. The choice of historical figures was a confusing one for *U.S. News*. Perhaps the audience didn't easily recognize our country's forefathers.

May 4, 1987
Total market: 456,982 **Change: -12,125**



Newsstand sale	244,600
Plus avg. sale	+63,957
Market share	53.3%
Plus avg. market share	+14.8%



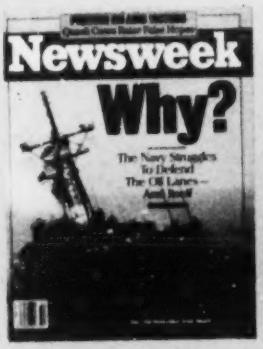
Newsstand sale	161,068
Below avg. sale	-70,700
Market share	35.2%
Below avg. market share	-14.2%

Newsstand sale	51,314
Below avg. sale	-5,380
Market share	11.2%
Below avg. market share	-1.7%

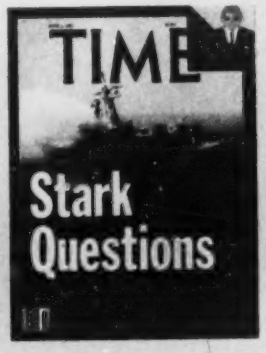
Just one week later, it's *Newsweek* that makes a big gain, capturing 53.3 percent of the market, an increase of 14.8 percent. The cover line "Depression" may seem like a downer, but the "good news" line perhaps buoyed interest. In any case, it is a subject most consumers can relate to. "Economic jitters" was another point of interest. The situation in South Africa didn't win big for *Time*, nor did "Drugs" pull well for *U.S. News*.

(CONTINUED)

June 1, 1987
Total market: 451,413 Change: -17,694



Newsstand sale	179,600
Below avg. sale	-1,043
Market share	39.8%
Plus avg. market share	+1.3%



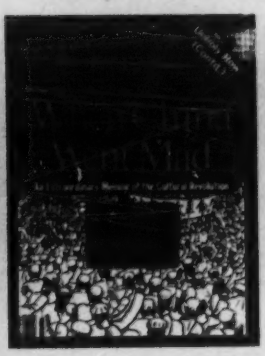
Newsstand sale	232,399
Plus avg. sale	+631
Market share	51.5%
Plus avg. market share	+2.1%

Newsstand sale	39,414
Below avg. sale	-17,280
Market share	8.7%
Below avg. market share	-4.2%

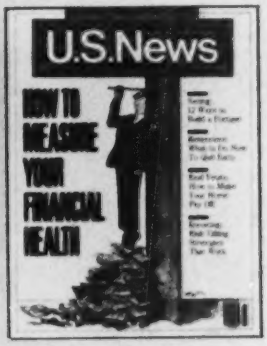
Covers on Iraqi missiles striking the naval ship *Stark* didn't pull exceptionally well for either *Newsweek* or *Time*. Both magazines could, at best, only retain market share; neither made big gains. Perhaps the banner on AIDS victims hurt *Newsweek*, while *Time* chose the banking situation for its secondary focus. *U.S. News*, which tends to use more illustrations for covers, did not do well with its "To catch a spy" cover. The lines were too hard to read.

June 8, 1987
Total market: 628,874 Change: +159,767

Newsstand sale	303,500
Plus avg. sale	+122,857
Market share	48.3%
Plus avg. market share	+9.8%



Newsstand sale	253,474
Plus avg. sale	+21,706
Market share	40.3%
Below avg. market share	-9.1%

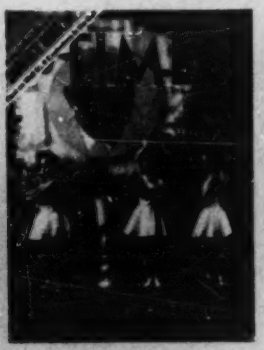


Newsstand sale	71,900
Plus avg. sale	+15,206
Market share	11.4%
Below avg. market share	-1.5%

Just one week later, the market jumps by more than 150,000 copies. *Newsweek* captures the modest and marginal buyers and builds its share of market by almost 10 percent. Readers were more attracted to Jim and Tammy Bakker than the politics of China. *Time*'s share of market is down by 9.1 percent. *U.S. News*, while gaining 15,206 buyers, actually lost a little bit of market share.

October 26, 1987
Total market: 537,986 Change: +68,879

Newsstand sale	183,300
Plus avg. sale	+2,657
Market share	34.1%
Below avg. market share	-4.4%



Newsstand sale	243,219
Plus avg. sale	+11,451
Market share	45.2%
Below avg. market share	-4.2%

Newsstand sale	111,467
Plus avg. sale	+54,773
Market share	20.7%
Plus avg. market share	+7.8%

During this week, the total market was up by almost 70,000 copies. But *Time* and *Newsweek* failed to make gains in total market share. That's because *U.S. News* performed strongly with its timely cover on "America's best colleges." This was the biggest seller for the newsweekly, selling 111,467 copies, nearly twice as many as the previous week (Oct. 12, 1987—not shown in this analysis). The title's market share rose to 20.7 percent, on a 7.8 percent increase.

3. Fashion titles

The women's fashion titles, *Elle, Glamour, Harper's Bazaar* and *Vogue*, are like the women's service titles in that they are heavily dependent on single-copy circulation, getting more than 50 percent of their circulation from this source. And their covers reflect this bias. They are more colorful and aggressive than the newsweeklies. And they are usually grouped together on the main line display fixture in a highly prominent position.

Elle, Glamour, Harper's Bazaar and *Vogue*

18 issues analyzed; covers dated from January 1987 to June 1988
Average market: **3,226,180**

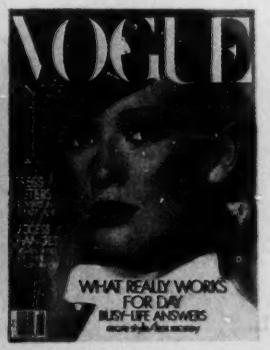
	Avg. mkt. share	Avg. nwsstnd. circ.	Avg. sub. circ.
Elle	15.7	503,781	300,000
Glamour	48.0	1,548,508	722,000
Harper's Bazaar	11.7	379,130	384,000
Vogue	24.6	794,759	440,000

August 1987 **Total market: 3,956,956** **Change: +730,776**

Newsstand sale	520,440
Plus avg. sale	+16,659
Market share	13.2%
Below avg. market share	-2.5%

Newsstand sale	1,994,229
Plus avg. sale	+445,721
Market share	50.4%
Plus avg. market share	+2.4%

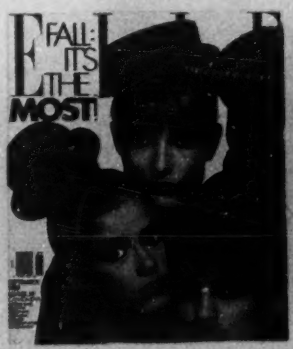
Newsstand sale	489,900
Plus avg. sale	+110,770
Market share	12.4%
Below avg. market share	-0.7%



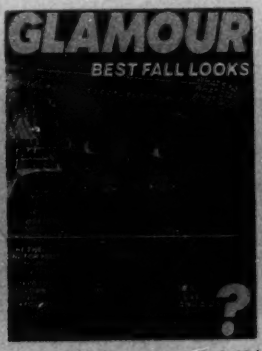
Newsstand sale	952,387
Plus avg. sale	+157,628
Market share	24.1%
Below avg. market share	-0.5%

Traditionally the fall issues have been the strongest for the women's fashion magazines, but August is becoming a big month for these titles. Here the market was up by more than 700,000 copies. Although actual single-copy sales were up for all the titles, only *Glamour* made a gain in market share. Playing up the new fall fashions gave *Glamour* the edge.

September 1987 **Total market: 3,975,928** **Change: +749,748**

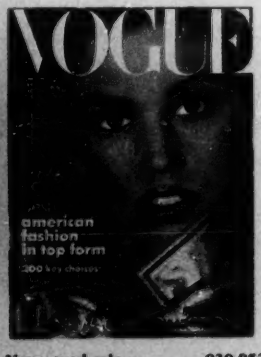


Newsstand sale	687,652
Plus avg. sale	+183,871
Market share	17.3%
Plus avg. market share	+1.6%



Newsstand sale	1,809,524
Plus avg. sale	+261,016
Market share	45.5%
Below avg. market share	-2.5%

Newsstand sale	547,900
Plus avg. sale	+168,770
Market share	13.8%
Plus avg. market share	+2.1%



Newsstand sale	930,852
Plus avg. sale	+136,093
Market share	23.4%
Below avg. market share	-1.2%

One month later, the total market surges again, up by almost 750,000 copies, to 3.9 million. This time *Elle* and *Harper's Bazaar* make market gains. Playing up fall fashions two months in a row didn't work for *Glamour*. *Elle*'s cover line, "Fall, it's the most" is clean, crisp and clear. The grabber on *Bazaar* is "Look sensational," a strong positive statement.

(CONTINUED)

ANALYZING COVERS (FASHION TITLES)

May 1988 Total market: **2,938,144** Change: **-288,036**

Newsstand sale	545,100
Plus avg. sale	+41,319
Market share	18.6%
Plus avg. market share	+2.9%

Newsstand sale	1,349,837
Below avg. sale	-198,671
Market share	45.9%
Plus avg. market share	-2.1%

Newsstand sale	368,000
Below avg. sale	-11,130
Market share	12.5%
Plus avg. market share	+0.8%

Newsstand sale	675,207
Below avg. sale	-119,552
Market share	23.0%
Below avg. market share	-1.6%

The market is down by 288,036 copies, but *Elle* once again gains in market share. It is also the only title to gain in actual sales, up by 41,319 copies to more than half a million in single-copy sales. Once again, the cover lines are clean and crisp, and the tropical feel to the cover plays into the upcoming hot weather.

June 1988 Total market: **3,238,129** Change: **+211,949**

Newsstand sale	541,000
Plus avg. sale	+37,219
Market share	16.7%
Plus avg. market share	+1.0%

Newsstand sale	1,605,056
Plus avg. sale	+56,548
Market share	49.6%
Plus avg. market share	+1.6%

Newsstand sale	322,000
Below avg. sale	-57,130
Market share	9.9%
Below avg. market share	-1.8%

Newsstand sale	770,073
Below avg. sale	-24,686
Market share	23.8%
Below avg. market share	-0.8%

This month the market was up slightly, and *Elle* once again makes inroads into market share. Good design is the key here. *Glamour* scores with its "real help" cover lines while the cover lines on *Harper's Bazaar* get lost. *Vogue*'s claim to have "first fall fashions" in June is just not believable.

(CONTINUED)

4. Computer titles

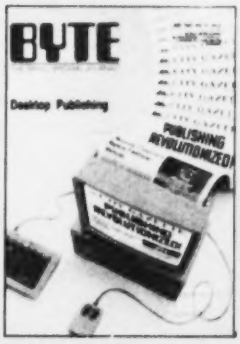
Probably the most interesting point here is the fact that the most technical title in the group, *Byte*, has the dominant market share, at 43.4 percent. *Byte* appears to be defensive in its cover treatment, while the other three titles appear more inclined to gamble. This is because single-copy circulation is such a small percentage of their circulation mix. The danger of gambling, illustrated by these titles, is that when you win, you win big, but when you lose . . .

Byte, Home Computing, Personal Computing and *Compute!*

18 issues analyzed; covers dated from January 1987 to June 1988
Average market: **283,881**

	Avg. mkt. share	Avg. nwsstnd. circ.	Avg. sub. circ.
Byte	43.4	122,742	300,000
Home Computing	18.9	53,876	400,000
Personal Computing	15.1	42,652	455,000
Compute!	22.7	64,610	230,000

May 1987 Total market: **299,282** Change: **+15,401**



Newsstand sale	114,381
Below avg. sale	-8,361
Market share	38.2%
Below avg. market share	-5.2%

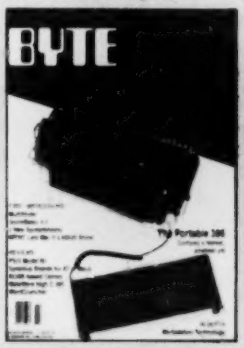
Newsstand sale	67,155
Plus avg. sale	+13,279
Market share	22.4%
Plus avg. market share	+3.5%

Newsstand sale	39,958
Below avg. sale	-2,694
Market share	13.4%
Below avg. market share	-1.7%

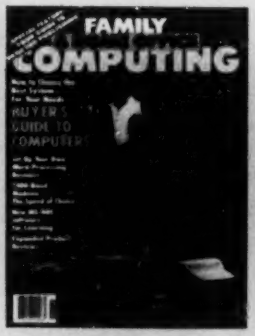
Newsstand sale	77,788
Plus avg. sale	+13,178
Market share	26.0%
Plus avg. market share	+3.3%

The market is up to almost 300,000 copies, and the ones that gain share of market are *Home Computing* (shown here as *Family Computing*) and *Compute!*. "Used computer" market is a good move for *Home Computing*—any budget conscious family would want to know more. "The buyer's guide to music software" is the key to *Compute!*'s success.

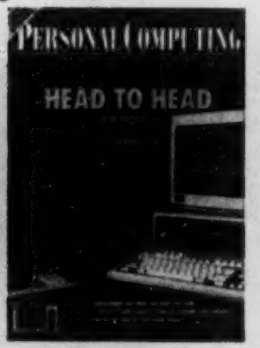
November 1987 Total market: **297,810** Change: **+13,929**



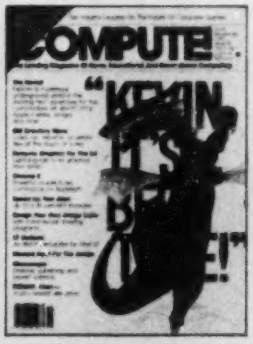
Newsstand sale	126,302
Plus avg. sale	+3,560
Market share	42.4%
Below avg. market share	-1.0%



Newsstand sale	67,441
Plus avg. sale	+13,565
Market share	22.6%
Plus avg. market share	+3.7



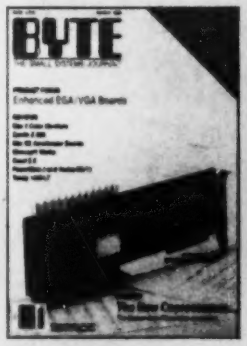
Newsstand sale	42,011
Below avg. sale	-641
Market share	14.1%
Below avg. market share	-1.0%



Newsstand sale	62,056
Below avg. sale	-2,554
Market share	20.8%
Below avg. market share	-1.9%

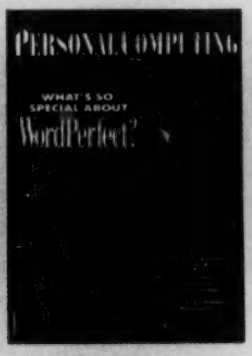
Three of the four titles failed to capitalize on the coming holiday season. While *Byte* dominates the market with a 42.4 percent share, it does not make any gains in market share. Only *Home Computing* (shown here with yet another name, *Family & Home Office Computing*) increases its market share with a buyer's guide to computers. What computer-minded parent could even think about buying a computer without this issue in hand?

March 1988 **Total market: 289,849** **Change: +5,968**



Newsstand sale	123,398
Plus avg. sale	+656
Market share	42.6%
Below avg. market share	-0.8%

Newsstand sale	60,129
Plus avg. sale	+6,253
Market share	20.7%
Plus avg. market share	+1.8%



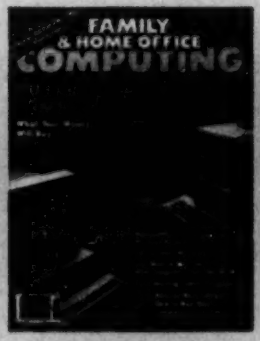
Newsstand sale	53,465
Plus avg. sale	+10,813
Market share	18.4%
Plus avg. market share	+3.3%

Newsstand sale	52,857
Below avg. sale	-11,753
Market share	18.2%
Below avg. market share	-4.5%

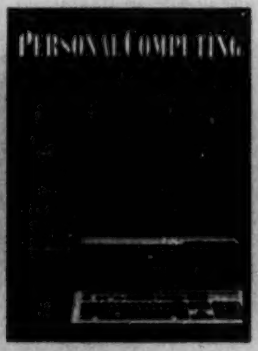
Byte dominates once again with a 42.6 percent share, but still does not make any gains in market share. The cover graphic is not easy to understand. Focusing on IBM compatibles is a natural for *Home Computing*, and this helps the title gain 1.8 percent in market share. A dramatic photograph helps to boost *Personal Computing*, up 3.3 percent in market share. *Compute!* returned to music too soon with this cover, and failed to boost its market standing.

June 1988 **Total market: 273,760** **Change: -10,121**

Newsstand sale	134,520
Plus avg. sale	+11,778
Market share	49.1%
Plus avg. market share	+5.7%



Newsstand sale	40,270
Below avg. sale	-13,606
Market share	14.7%
Below avg. market share	-4.2%



Newsstand sale	45,665
Plus avg. sale	+3,013
Market share	16.7%
Plus avg. market share	+1.6%

Newsstand sale	53,305
Below avg. sale	-11,305
Market share	19.5%
Below avg. market share	-3.2%

Byte hits the market with a strong cover graphic and it works. It is clever and easy to understand. The title's hold on the market surges to 49.1 percent, with a 5.7 percent gain in market share. *Personal Computing* made additional gains in market share by concentrating on new techology. *Home Computing* tried, but misses, with a buyer's guide to computers. The subject is too general: guides to printers, or IBM clones, are a better bet. *Compute!*'s cover is too busy.□